

OpenText Flexible Credits

Redeem Flexible Credits for Short-Term Services

Guide

www.microfocus.com/flexiblecredits

Reviewers' Guide

Flexible Credits Introduction

Flexible Credits are an OpenText™ service currency that provides you with a flexible way to obtain additional short-term services when you need them. We know things come up: you have a critical issue and need someone onsite, you could use some help to get a new product installed, or you could use some training to know how to better manage and get value from your current solution. We also know what a hassle it is to get a PO approved mid-contract for these services. We are here to make your life easier: Flexible Credits can be purchased up-front or at any time during the life of your contract, to provide you with a source

of funding for the services you need, when you need them. We want you to have a successful experience with your OpenText solutions, so leverage our services when you need us. You can redeem your Flexible Credits anytime during the 12-month period from purchase, for Support, Learning Services, or Consulting services. Contact us and we will tailor services to meet your needs.

This document provides an introduction to the types of services you can receive, instructions for redeeming your credits, and policies for usage.





Support

You may redeem Flexible Credits for a variety of Support services tailored to your needs. We will build a package customized to your situation using the core building blocks listed at the end of the Support section. Contact us to discuss your unique environment, business needs, and future plans. To get you started, we have listed a sampling of support services that will help you get the most from your OpenText software investment.

Premium Support

After you have leveraged our short-term services, you can continue to rely on us. With the unique knowledge we gain of your business, we can continue to provide you with personalized support, by giving you direct access to a senior designated support engineer; with availability ranging from remote support to dedicated on-site resources. Learn more about [Premium Support](#).

Sampling of Support Services

Support Service	Description	Typical Time	Flexible Credits
Supportability Assessment	We can help you proactively prevent problems and minimize critical events. We will provide a formal review and analysis of your environment; looking at configuration, patch currency and other factors that affect stability and performance. When we're done, we'll provide recommendations to optimize your existing systems and to leverage best practices to avoid problems. This service typically includes a remote kick-off meeting to initiate data gathering, followed by on-site time for a hands-on look at the environment and conversations with your staff, ending with a discussion of recommendations and preparation and delivery of a report.	2 Remote Days 3 Onsite Days	21
Upgrade Assistance	Engage us to review your upgrade plan and offer recommendations for improvement. We'll educate you on best practices and help you avoid common problems, to ensure your upgrade proceeds as smoothly as possible. And then we'll be available on-call during the upgrade to offer assistance in the event any problems arise.	1 Remote Day 2 Onsite Days 8 hours Scheduled Standby	17
Technical Mentoring	Do you have a complex product in your environment? Do you need to know how to optimally maintain and configure your product? Would you like to know the underlying structure of how a product works? Learn from the experts in an informal white-board session where we will provide knowledge transfer to your staff.	2 Onsite Days	10
Product Planning	Are you getting the full value from the products you own? Are you aware of the new functionality coming out in future releases? Do you have a solid upgrade or migration strategy? Does your patching strategy align with the OpenText release schedule? We'll brief you on what you need to know to maximize the value from your OpenText solutions.	1 Remote Day 2 Onsite Days	13
Troubleshooting Workshop	Learn tips and tricks from the experts who have been trouble-shooting these products for years. We will share techniques and tools to isolate problems quickly, and will share best practices with your team of how to optimally configure and maintain your products to avoid problems in the future.	1 Remote Day 2 Onsite Days	13
Onsite Assistance	When the unexpected occurs, we can send an expert to help you bring your systems back online.	2 Onsite Days	10
Onsite Advisement	We can provide proactive technical guidance & direction, to help you get the most from your products and avoid any gotchas.	1 Remote Day 2 Onsite Days	13
Remote Assistance	When you can't afford to wait for travel time to your site, we will connect to your system and be working in minutes to accelerate the time to resolution.	2 Remote Days	6
Scheduled Standby	Arrange for an experienced technical support engineer to be available at a specific time and date, outside of business hours, while you perform updates or maintenance. Prior to your on-call period, talk to this expert for up to an hour to seek advice and to familiarize them with your system and planned changes. During the on-call period, reach the engineer with a target 30-minute response time.	8 hours	4
Post-Implementation Support	Did you recently install or upgrade your product? Whether your staff did the work, or you engaged Professional Services or a skilled partner; we can step in to teach you how to maintain the new environment, help you address any problems that come up, and provide guidance of how to get the most benefit from your new solution.	2 Onsite Days 4 weeks Personalized Support	30
Personalized Support	Work with a designated senior engineer to get focused attention on a critical problem, get advice on implementation, or review configuration and patching.	2 weeks (≤10 hours) 9x5, Remote	10
Scripting and Test Automation (available for select products)	Work with an expert who will provide guidance in setting up scripting and test automation services, report setup, or configuration.	5 Remote Days	15

Contact us today, and after reviewing your situation, we will deliver one of the above services or build a custom support service for you utilizing these core building blocks:

Core Building Blocks for Support	Credits
Scheduled Standby for 4 hours outside business hours	2 credits
1-day Remote Support	3 credits
1-day Remote Support outside business hours	4 credits
1-day Onsite Support (2 days minimum)	5 credits
1-day Onsite Support (outside business hours or less than 1-week notice)	6 credits
Personalized Support (up to 10 hours over 2 week period, 9x5, remote)	10 credits



Learning Services

Flexible Credits may be used for our wide range of Learning Services. Training helps maximize your product investments by making it

convenient for you to gain the knowledge needed to install, configure and administer OpenText products and solutions. Training is offered in the following ways:

Training Service	Description
Instructor-Led Training	Traditional training delivery with a knowledgeable instructor. Courses can be attended online or at your location. Courses typically are taught with hands-on labs where you can practice concepts taught within the course.
Digital Learning	Just in time courses, available 24x7x365 whenever an Internet connection is available. OpenText Digital Learning is provided as a subscription to allow students to access training whenever it is needed.
OpenText Certifications	The OpenText family of certifications helps you to prove your understanding and skills on topics and platforms ranging from workload management, identity management, and endpoint management, to backend operating systems and integration.

The number of Flexible Credits needed varies by course.

Contact a [Learning Services specialist](#) or contact your Customer Success Manager (CSM) if you have questions about the Learning Services we have available. Additional information can be found on our [Learning Services portal](#).

Consulting

Flexible Credits may be redeemed for Consulting services that range from conceptual planning or design, to implementation assistance, to analysis of your technology environment, or similar expert advice or assistance. We leverage our years of experience to help you capitalize on your IT investment without burdening your IT staff. Our expertise and proven delivery methodology enable customers to achieve tangible results and realize return on investment within an accelerated time-frame. These services include activities beyond the scope of Support services but are time-based rather than being tied to specific deliverables or objectives.

See below a sampling of the types of Consulting services we can provide, and reach out to a Consulting Manager to discuss which services are available for use with your Flexible Credits.

Assumptions

- Consulting services will be delivered during normal business hours.
- The start date and schedule will be agreed prior to commencement.
- Consulting is redeemed in 1-week increments unless agreed otherwise.

- Requests will be reviewed to determine if the scope is appropriate for Flexible Credits or if a Statement of Work is required at additional cost.



Consulting Service	Description
Assessments	
Implementation Assessment	Determine overall scope of effort to implement a OpenText solution. Includes readiness assessment and implementation planning.
Upgrade Assessment	Determine technical and business readiness for an upgrade to the latest solution version.
Maturity Assessments	Determine readiness and provide planning for DevOps, IT4IT, Hybrid Cloud, Enterprise Mobile, Automation or Security Operations initiatives.
Cyber Incident Readiness Review	Security engagement focused on readiness to deal with an incident.
Transformation Workshops	
DevOps	Prioritize initiatives to accelerate DevOps adoption and improve the speed of application release. Accelerate your ability to transform to a more agile, quality-oriented, user-centric organization. Quick wins. Discuss value contribution, issues and solutions.
Hybrid IT	Realize the scope, scale, and critical success factors for your multi-supplier and service integration project. Identify quick wins that generate momentum. Leverage frameworks such as ITIL, COBIT, and TOGAF.
Consulting	
QuickStarts	Fast time to value for certain OpenText software, includes basic configuration and enablement.
Automation use case pilot	Show the cost or resource benefits from automation.
Staff Augmentation	Onsite help to cover technical, administrative or operational activities.
Business Dashboards	How to design & build dashboards to monitor key IT metrics & showcase business value

Each of the above services requires a minimum of 5 days. The number of Flexible Credits needed varies by country.

How to Redeem Flexible Credits

After you have purchased Flexible Credits, you may redeem them for services up to 12-months from purchase. On the [OpenText Support Portal](#) you will find a **Flexible Credits menu** where you may check your Credit History or submit a Delivery Request to redeem your Flexible Credits for services. A manager from Support, Learning Services or Consulting will contact you to discuss your needs and arrange for delivery. Please contact OpenText at least three weeks before you plan to use the services so we have time to schedule the appropriate resources.

Learning Services Redemption Process

If you would like to use your Flexible Credits for a Learning Services offering, you will navigate to the [OpenText Support Portal](#), select the Flexible Credit menu, submit a "Delivery Request" and select "Education request." A training coordinator will contact you to discuss your request.

- If you would like Instructor-Led Training, the training coordinator will gather information about the topic and number of students, determine if you prefer public or private instruction, find out if you prefer virtual or on-site, and then will send you a code that allows you to register for the class on the [Learning Services Portal](#).
- If you would like Digital Learning or OpenText Certification, the training coordinator will email you a confirmation code that will allow you to access your Digital Learning or Certification exam on the [Learning Services Portal](#).
- If you would like to register for classes or exams in the future, we can deposit your Flexible Credits into your Learning Services account as "Training Units", and you can login to the [Learning Services Portal](#) to register for classes or exams at your convenience.

Contact a [training coordinator](#) if you have any questions. Include your name and contact information, company name, TU code or Support Agreement ID (if you have this), the number of Flexible Credits you purchased, and how you would like to redeem your Flexible Credits. Include sufficient information for us to review your request. The training coordinator will respond to you within 2 business days regarding your request.

A few limitations to be aware of:

- Flexible Credits may not be redeemed for classes delivered by a Training Partner.
- Flexible Credits may not be redeemed for Licensed ART.

Flexible Credit Policies

See the [Flexible Credits Terms](#) for the terms that govern the purchase and use of Flexible Credits.

About OpenText

OpenText is a global software company with 40 years of experience in delivering and supporting enterprise software solutions that help customers innovate faster with lower risk. By applying proven expertise in software and security, we enable customers to utilize new technology solutions while maximizing the value of their investments in critical IT infrastructure and business applications. As a result, they can build, operate, and secure the IT systems that bring together existing business logic and applications with emerging technologies—in essence, bridging the old and the new—to meet their increasingly complex business demands.

Learn more at
[Flexible Credits](#)

www.opentext.com

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